

Data Manager Tasks

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The following document summarizes the tasks that fall under the responsibility of the data manager(s). It provides a summary of the daily, monthly, and *ad hoc* tasks we have done to keep member records up to date.

1. **VMS Help and Training Guides:** see <http://texasmasternaturalist.freshdesk.com/support/home/>
Note that ongoing updates made by the state VMS administrators may result in the addition of new fields or changes to how records are kept. Refer to all documents and training on this site for the latest information.
2. **VMS Profile Set-up New Interns**
 - a. Contact the VMS Help Desk <http://texasmasternaturalist.freshdesk.com/support/home/>
To ask them to check on the TPWD master list to verify that new interns are not already listed in VMS under the same or other name. If person is already on the TPWD list, the Help Desk will add their existing logon and information to the VMS Cradle of Texas user list. DO NOT BUILD A SECOND LOGON for people already in VMS.
 - b. Obtain new class information from Training Director and build initial profile for each person in VMS, include user name and password.
 - i. User name convention for interns not already in VMS: Cradle-First Initial Last Name, e.g. Mary Smith would be entered as Cradle-MSmith.
 - ii. User name convention for interns already in VMS: accept the user name that was previously defined
 - iii. Password convention: the passwords will be updated by the user as soon as they access the system for the first time, so pick something easy for everyone as a starting point such as Cradle-FirstNameYear, e.g., Cradle-Mary2019.
 - c. Under **VMS/User Defined/Certifications**, enter 'TMN Class Year' and then enter 'Chapter Trained in,' and 'Current Chapter' as 'Cradle of Texas Master Naturalists.'
 - d. To set Activity and certification status for new interns, see 'VMS Master Naturalist Certification Status' below.
 - e. After VMS training, verify that interns have completed their profile information entry.
3. **VMS Profile Updates**

Help all members as needed to update their profile information. Note that all members must agree to a background check so that they are authorized to volunteer.
4. **VMS Member Transfer**

Contact the VMS Help Desk for help to either transfer a member into the chapter or to transfer a member out of the chapter. The VMS Help Desk must be involved in this process, as it is complex.

5. **VMS Member Deceased**

If an active master naturalist member dies, set 'Activity Status' under **VMS Edit/Personal** to 'Deceased' and set master naturalist status under **VMS/Edit/User Defined/ Certifications/Master Naturalist Certification Status** to 'Inactive.'

6. **VMS Master Naturalist Certification Status**

- a. Set 'Activity Status' under **VMS Edit/Personal** to 'Active.' Since members may be volunteering at other TPWD organizations, this status should never be changed even if the person decides to leave TMN-COT.
- b. Set master naturalist status under **VMS/Edit/User Defined/Certifications/Master Naturalist Certification Status**.
 - i. For new interns, set the master naturalist certification status to 'In-training.'
 - ii. For interns who have completed training, on-going active members, or members who transfer from another chapter with an active status to a master naturalist certification status of 'Active.'
 - iii. For chapter advisors, set the master naturalist certification status to 'Advisor.' Note – Advisor may also be used in a limited sense for members who head a partner organization, are still actively working, have completed master naturalist training, but who are unable to volunteer for additional hours. An example is the Director of Brazoria County Parks.)
 - iv. For members who meet the requirements of inactive, i.e., no hours reported for a year and dues not paid, set the master naturalist certification status to 'Inactive.' Note – a member who has been moved to an inactive status may be re-instated. If a member is moved to inactive, make a note in the 'Master Naturalist Certification Comments' field with the date they moved to inactive status and, optionally, a reason why.

7. **VMS Opportunities New Interns**

- a. Notify VT Director to add basic set of opportunities for new interns and also the Initial Training Code.
- b. Notify VT Director when training classes are completed and each intern has reached 40 hours total training. The VT Director will remove the IT (initial training) opportunity from the opportunity lists when it is no longer needed.

8. **VMS Opportunities All Members**

- a. The Volunteer Services Director will define the basic set of opportunity codes for each member.
- b. On an ongoing basis, the Data Manager may note from the VMS hours entries that an additional code is needed, e.g. work at Sea Center Texas, Other: Animal Rehab, etc. and notify the Volunteer Services Director to add additional codes.

9. VMS Dues Records

- a. Work with COT Treasurer to obtain dues status information throughout the year.
- b. Enter dues status into **VMS (Edit/User Defined/Certification/Dues paid through [])**.
- c. Enter 2099 as the dues paid date if a member has paid lifetime dues and make a note in the certification comments with date that lifetime dues were paid.

10. VMS Officer and Committee Members

- a. When new officers or committee members are identified, enter information into VMS under **VMS (Edit/User Defined/TMN Officers/Committees)**.
- b. For newly elected officers, check off box from 'Officer List' and add a comment under 'Officer and/or Committee Duties' with the year and title of the officer position, e.g. 2019 – Vice-President.
- c. For officers who will no longer be serving, go into VMS by the same process and uncheck the box from the officer list. Make sure that the beginning and end year(s) and titles are listed in the 'Officer and/or Committee Duties' comment box.
- d. For committee members, e.g., Training Committee, no box should be checked. Instead enter the year and committee in the box labeled 'Committee member of []'. Also enter the same information in the 'Officer and/or Committee Duties' comment box.
- e. For committee members who will no longer be serving, go into VMS by the same process and delete the entry under 'Committee Member of []'. Make sure that the beginning and end year(s) and committee membership is listed correctly in the 'Officer and/or Committee Duties' comment box.
- f. **Note – this is the only place in VMS that the historical officer records exist, so it must be kept up to date.**
- g. Run a 'TMN Standard Board and Committee Report' from the VMS Volunteers menu and provide to the President periodically.

11. VMS Hours Management

- a. Review all entries for correct use of code, hours limits, and descriptions.
- b. Disapprove entries where wrong code is used and rekey entry using correct code (alternatively, send email to member to do their own correction). Put in comment as to why code was disapproved and what it was re-entered as. Contact members who repeatedly use wrong codes and re-educate.
- c. Disapprove entries where activity does not qualify for volunteer service, e.g., food prep for chapter meetings, for Migration Celebration dinner, etc.
- d. Correct all entries with missing descriptors (e.g. chapter meeting) or poor descriptors. Contact member if needed for clarification.
- e. Approve all correct or corrected entries.
- f. For interns, verify that there are two entries for each class with a two hour max on each. Periodically provide reports to the Training Director with details of the intern training entry so that he/she can verify that the data is accurate.
 - i. 2 hrs. classroom lecture on []
 - ii. 2 hrs. field trip on [] at [] location

12. VMS Impact Data Entry

- a. Data Managers instruct individuals how they can enter impact data into VMS when either TR or PO codes are used and they were the sole individual from COT who performed the activity. Only Total Adult and Total Youth numbers are required.
- b. For events such as DEEP where there is more than one COT volunteer who attends, the impact numbers may be entered against only one person. The Data Managers attempt to get this information from the leader of each event, e.g. Tom Schneider for DEEP, Ruby Lewis for the library programs, etc. and select an individual who has volunteered that day and edit the record to add the impact data for the event. Sometimes the data is not provided.

13. VMS Intern Initial Hours Tracking, Certification, and Recertification

- a. Track intern hours weekly during the training period and notify interns periodically if time records are missing or inaccurate.
- b. When an intern has reached 40 hrs. volunteer service and 8 hrs. advanced training AND the Training Director has confirmed with the Data Manager that the person has met the training requirements to graduate, record the initial certification date under **VMS/Edit/User Defined/Certifications/Initial Certification Date**. On the same screen, set the 'Chapter Certified in' to 'Cradle of Texas Master Naturalists.'
 - i. Note – interns have through the end of the calendar year following training to complete the 40/8 requirement. This is tricky to monitor in VMS, as the hours reports for graduated interns must be run for a two-year block of time.
- c. If an intern reaches 80 hrs. Volunteer Service and 16 hrs. Advanced Training in the same calendar year that training occurs, the intern can receive both initial certification status and recertification status in the same year (this may occur at or after the intern graduation, as long as the volunteer service and advanced training are completed by Dec. 31st the year of training.
 - i. Note – to track recertification status for interns who do not complete their 40/8 hours until into the next calendar year (Year 2), the Data Manager must run a two-year report. Hours cannot be counted for both initial certification and recertification. In Year 2, the hours counted for recertification must exclude any hours that were already counted for initial certification.

14. VMS Recertification

- a. On the first of each month, determine which master naturalists have reached the 40/8 hours needed to recertify. Select **VMS/Log Book/All Volunteers in Grid**. Set 'Relative Date Range' to 'This Year' and select 'TMN Standard Current Year Recertification' from the Drop-down box under 'Saved Grids' and 'TMN-Vol Hours Approved' from Filter Drop-down box. Click on 'Find.'
 - i. Review report. Identify all master naturalists who have reached 40/8 who do not have a recertification date for the current year in the 'Master Naturalist Cert Date' field.

- ii. Report this list of individuals to the Membership Director, President, Secretary, Newsletter Editor, and AgriLife Advisor so that recertification pins can be prepared and notifications can occur at the Board Meeting, General Meeting, and in the next newsletter and also be used in AgriLife statistics.
- b. Tip: Then set the filter under 'Master Naturalist Cert Date' to '<[current year], e.g., <2019 for tracking recertifications in 2019. This way, only the list of people who have not already been recertified will appear. [note – this tip doesn't work for interns who have >40/8 in the current year but it is a time-saver to find everyone else.]
- c. Note: since members have until Feb. 15 of the following year to get their hours in, the 'Current Year Recertification' report will have to be run for 'Last Year' also until this date has passed. Thus, a member can recertify for 2018 if sufficient hours from 2018 are turned in by Feb. 15 of 2019.
- d. Document the recertification date in **VMS/Edit/User Defined/Certifications** under 'Date last re-certified.' Typically, we use the meeting date for the month as the recertification date, as that is when the pin award will be recognized, regardless of whether the awardee is at the meeting. For members who don't report all their hours until Feb. of the following year, put their 'Date last re-certified' as Dec. 31 of the previous year, e.g., a member who doesn't document their 2018 hours until Feb. 15 of 2019, should be noted as achieving recertification on Dec. 31, 2018.

15. VMS Milestones

- a. On the first of each month, determine which master naturalists have achieved a new milestone. Select **VMS/Log Book/All Volunteers in Grid**. Set 'Relative Date Range' to 'All Time' and select each of the reports listed below from the Drop-down box under 'Saved Grids' and 'TMN-Vol Hours Approved' from Filter Drop-down box. Click on 'Find.'
 - i. TMN Standard-Awards 00250 Hours
 - ii. TMN Standard-Awards 00500 Hours
 - iii. TMN Standard-Awards 01000 Hours
 - iv. TMN Standard-Awards 02500 Hours
 - v. TMN Standard-Awards 04000 Hours
 - vi. TMN Standard-Awards 05000 Hours
 - vii. TMN Standard-Awards 10000 Hours
 - viii. Etc.
- b. New awardees may be easily recognized by a blank entry in the Award Hours field and Award Hours date field. Report all new milestone achievements to the Membership Director, President, Secretary, Newsletter Editor, and AgriLife Advisor so that milestone pins can be prepared and notifications can occur at the Board Meeting, General Meeting, and in the next newsletter and also be used in AgriLife statistics.
 - i. For members achieving 4000, 5000, 10000 or higher milestone awards, notify the Membership Director and Chapter Host so that arrangements can be made for a cake or other celebration.
 - ii. For members achieving 4000 hours, notify the Membership Director so that he/she can request from Michelle Haggerty that the President's Call to Service Award and the master naturalist 4000 hour pin are ordered.

- iii. For members achieving 5000 hours or greater, notify the Membership Director so that he/she can request from Michelle Haggerty that the master naturalist pin is ordered.
- c. Document the milestone hours award achieved under **VMS/Edit/User Defined/TMN Recognition**. Select the milestone achieved and change the 'xxx TMN Hours Awarded' field to 'YES' and the 'xxx TMN Hrs. Award Date' to the date received. We typically record the date as the next general meeting date, as that is when the awardee will be recognized, regardless of whether he/she is present at the meeting.

16. VMS YTD Hours and YTD Impact Reports

- a. Monthly YTD Reports: Select **VMS/Log Book/All Volunteers in Grid**. Set 'Relative Date Range' to 'This Year'. Select 'TMN Standard Reporting – Summary' from the Drop-down box under 'Saved Grids' and 'TMN-Vol Hours Approved' from Filter Drop-down box. Click on 'Find.'
 - i. Note – to get 12 month data after a new year has started, the 'Relative Date Range' needs to be set to 'Last Year' or the search must be done for a specific date range.
- b. At the bottom of the report summary, find the number of volunteers, the total TMN Hours, total AT Hours, Adult Sub-total (impact hours) and Youth Sub-total (impact hours). Report these YTD numbers to the Membership Director, President, Secretary, Newsletter Editor, and AgriLife Advisor for reporting at the Board Meeting, General Meeting, the next newsletter and for AgriLife statistics.

17. VMS Impact Data Reports for AgriLife

- a. AgriLife requires a report each month with the detailed information for all impact data listing the date, event, and number of adults and youth impacted.
- b. To run this report, select **VMS/Log Book/All Volunteers in Grid**. Set 'Relative Date Range' to 'This Year'. Select 'TMN Standard Reporting –Detail' from the Drop-down box under 'Saved Grids' and 'TMN-Vol Hours Approved' from Filter Drop-down box Click on 'Find.'
- c. When the report appears on the screen, filter the data by setting the 'Approval Date' to '> [last day of previous month], e.g., when running the report on July 1, 2019 for June 2019 impact data, set the 'Approval Date' to '>05/31/2019.' The resulting data will include all entries that were approved after May 31st and thus reflect detailed impact data that has not been sent to AgriLife. Because there is a lag of when members enter their data in VMS, the monthly impact reports usually include some data from the previous month that was not previously reported.
- d. Create a report and send this data to Excel. The Excel file needs to be edited to remove all lines that do not include impact data. Typically, impact data will be found only under PO or TR codes, although there are occasional entries under RM. If the Data Managers notice that there are PO or TR entries with missing impact data, a reasonable effort is made to contact the individual and get the information. For DEEP or other multi-volunteer events, only the row with the impact data should be saved on the report. If more than one member participated in the volunteer effort, we typically change the name of the volunteer to "Multiple Volunteers"

- e. Send the report to John O’Connell at AgriLife and to his Admin Assistant on the 1st or 2nd of each month and to the Membership Director.

18. Ad-hoc VMS Reports

- a. At the request of members, officers, or partners, the Data Managers extract requested data from VMS and send specialized reports. Typical examples include members who want to get a detailed status update of their hours reporting mid-year, a partner who wants to see how many hours were volunteered for a specific project, or overall statistics that might be used for planning by the Board. The other common report is ‘Volunteer Phone List’ which is sent periodically to all members.

19. VMS Audits

- a. The State TMN organization conducts audits of VMS records annually and makes recommendations to the chapter for changes needed in coding, data fields, etc. The Data Managers work with the President, Membership Director, and Volunteer Services Director to effect the required changes in VMS.

20. VMS Training

- a. The Data Managers have created a VMS guide specific to VMS. It is available on the COT web site under ‘VMS Info.’ It is updated periodically.
- b. The Data Managers conduct a training class for new interns on their first class day and mentor them as needed until they are successful at VMS entries.

21. Entomology Specialist

For members who obtain the Entomology Specialist Certification, record the date certification was achieved under **User Defined/Certifications/Master Naturalist Certification Comments**. As of 2019, there was not a specific field in VMS to record this certification.

22. Texas Water Specialist

- a. For members who are working on their Texas Water Specialist Certification, select “In Progress” under **User Defined/Texas Water Specialist/Texas Waters Specialist Certification**. The state coordinator for the Texas Water Specialist program will change this field to “Yes” when certification has been achieved.
- b. Note that members who are working on their Texas Waters Specialist certification need to have a specific AT: TX Water Specialist added to their opportunity list to correctly accumulate AT hours needed for certification.